

COLETTE BARON-REID'S

THE *Spirit* OF YOUR  
**BUSINESS**  
MASTERCLASS

*Bonus Call!*



# THE *Spirit* OF YOUR BUSINESS MASTERCLASS

## Tech Mastery Q&A: Unlocking Business Success Through Technology

Thank you for joining us for our special 90-minute bonus Tech Mastery Q&A! This session was designed to provide you with invaluable support in navigating the technological aspects of your business.

Led by Colette's trusted team members, including COO Marc Lindeman, Operations Manager Brianna Miller, and Head of Marketing ElizaBeth Fincannon, this exclusive call was dedicated to addressing your burning questions and concerns related to leveraging technology for business success.

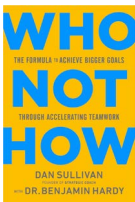
During the call, you had the chance to ask specific questions about the tools, platforms, and techniques that can enhance your business operations, streamline processes, and boost your online presence. And we shared our expertise, practical tips, and real-world examples to help you overcome hurdles and unlock the power of technology in your entrepreneurial journey.

Below are links and information about some of the platforms we reference in the live call.

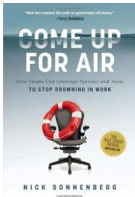
*\*\*Please note that some of these links are affiliate links.*

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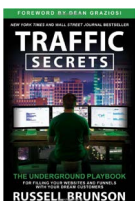
## **Book Recommendations:**



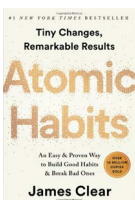
["Who Not How: The Formula to Achieve Bigger Goals Through Accelerating Teamwork" by Dan Sullivan](#)



["Come Up For Air: How Teams Can Leverage Systems and Tools to Stop Drowning in Work" by Nick Sonnenberg](#)



["Traffic Secrets: The Underground Playbook for Filling Your Websites and Funnels with Your Dream Customers" by Russell Brunson](#)



["Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones" by James Clear](#)

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## Tech Resources & Recommendations

### **Bookkeeping:**

**You Asked:** *What software is most beneficial and easiest to interact with for bookkeeping/accounting in a small business?*

### **Top Recommendation:**

- [Quickbooks](#) – Plans that fit any business • Income and expenses. Securely import transactions and organize your finances automatically. • Invoice and payments • Tax deductions.

### **Other Options:**

- [Freshbooks](#) – Accounting Software Built for Business Owners and Accountants.
- [Xero](#) – Xero online accounting software for your business connects you to your bank, accountant, bookkeeper, and other business apps.
- [Honeybook](#) – HoneyBook is the leading clientflow platform that enables independent businesses to book clients, manage projects, and get paid all in one place.
- [17Hats](#) – 17hats is a cloud-based business management platform that helps automate the entire business process.



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## **Booking System:**

**You Asked:** *What booking system is the best for small businesses?*

### **Top Recommendation:**

- [Calendly](#) – Calendly is your scheduling automation platform for eliminating the back-and-forth emails to find the perfect time – and so much more.

### **Other Options:**

- [Acuity](#) – Acuity Scheduling helps you automate everything from payments to reminders.

## **Startup Tech Stack:**

**You Asked:** *What are the best tools/products/systems for utilizing technology in general?  
Can I get a general overview of options and their uses?*

### **Top Recommendation:**

- **CRM System/Email Service**
  - a. [Gmail](#) – Gmail is a free email service provided by Google that enables users to send and receive e-mail over the Internet.
  - b. [Mailchimp](#) – Mailchimp is an all-in-one marketing platform that helps you manage and talk to your clients, customers, and other interested parties.

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- c. [Ontraport](#) – Ontraport is a CRM and automation platform designed for any business that's ready to scale, giving you all the tools you need for selling, marketing and managing a business online – in one app.
- d. [Active Campaign](#) – ActiveCampaign is a Customer Experience Automation platform that helps businesses connect and engage with customers. It creates optimized customer experiences by automating many behind-the-scenes marketing, sales, and support processes.
- e. [Keap](#) – Keap is the leading small business CRM and automation platform built exclusively to help small businesses save time and grow without the chaos.

## • Ecommerce Platform

- a. [Shopify](#) – Shopify is a complete commerce platform that lets you start, grow, and manage a business.
- b. [WooCommerce](#) – Woo is the open-source ecommerce platform that helps merchants and developers build successful businesses for the long term.

## • Social Media Scheduling Platform

- a. [Hootsuite](#) – Hootsuite is an all-in-one social media management tool. It lets you schedule, post, and track performance across all your social media networks from one dashboard.
- b. [Later](#) – Later is a social media management platform and link in bio tool for every social network. Plan, analyze, and publish content in advance – so you can save time & grow your business.

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## • Course Builder

- a. [Kajabi](#) – Kajabi empowers you to create all kinds of content to showcase what you know best, including online courses, coaching programs, podcasts, memberships, and more.
- b. [Clickfunnels](#) – ClickFunnels allows using its analytics tool to keep track of your funnel's performance that includes conversions, click-throughs, visitors, and opt-ins.
- c. [Thinkific](#) – The all-in-one platform to help you easily create, market & sell your own online courses. Thinkific is everything you need to run your education business under one roof.
- d. [Teachable](#) – Teachable is a no-code platform for creators who want to build more impactful businesses through courses, coaching, and digital downloads.
- e. [Circle](#) – The all-in-one community platform for creators & brands. Bring together engaging courses, discussions, members, live streams, chat, events, and memberships – all in one place, all under your own brand.
- f. [High Level](#) – HighLevel is the first-ever all-in-one platform that will give you the tools, support and resources you need to succeed with your agency.

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## • Project Management & Communication

- a. [Asana](#) – Asana is a leader in collaborative project management software for teams, no matter their size or locational distribution. Asana helps you, your teams, and your stakeholders collaborate faster and smoother to achieve business objectives.
- b. [Monday](#) – monday.com Work OS is an open platform where anyone can create the tools they need to run every aspect of their work. With monday.com Work OS teams can create any workflow to manage anything they need.
- c. [Trello](#) – Trello is the visual tool that empowers your team to manage any type of project, workflow, or task tracking. Add files, checklists, or even automation: Customize it all for how your team works best.
- d. [Clickup](#) – ClickUp is a cloud-based collaboration and project management tool suitable for businesses of all sizes and industries. Features include communication and collaboration tools, task assignments and statuses, alerts and a task toolbar.
- e. [Slack](#) – Slack is a messaging app for business that connects people to the information they need. By bringing people together to work as one unified team, Slack transforms the way organizations communicate.



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## • Hiring Outsourcers & Virtual Assistants

- a. [Upwork](#) – Upwork connects businesses with independent professionals and agencies around the globe.
- b. [FreeUp](#) – FreeUp is a freelance marketplace dedicated to connecting business owners with talented freelancers and remote workers from all over the world.
- c. [Outsourced.ph](#) – Outsourced.ph is a leading ISO certified Philippines staff outsourcing company providing dedicated quality remote staff and offshore staffing services.

## • Content Creation

- a. [Canva](#) – Canva is a free-to-use online graphic design tool. Use it to create social media posts, presentations, posters, videos, logos and more.
- b. [Riverside](#) – Riverside.fm makes it easy for podcasters and media companies to record remote interviews in studio quality.
- c. [Loom](#) – Loom’s technology includes screen and camera recording, video editing, transcription, and the ability to share the recorded video link with others.
- d. [Capcut](#) – CapCut is an all-in-one video editor that makes video creating and sharing easier.

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## **Website Builders:**

**You Asked:** *How can I set up an attractive and cost-effective website that is easy to set up and use, especially for a beginner?:*

- a. **High Level** - HighLevel is the first-ever all-in-one platform that will give you the tools, support and resources you need to succeed with your agency.
- b. **Squarespace** - Squarespace is an all-in-one content management system, or CMS. With a single subscription, you can make a website, host your content, register your own custom domain name, sell products, track your site's analytics, and much more.
- c. **Wix** - Wix is for everyone and makes it possible to create a high-quality website without knowing how to code.
- d. **Wordpress** - Open source software which you can use to easily create a beautiful website, blog, or app.
- e. **10Web** - AI Website Builder, helps you accelerate your website building process. Build or recreate any website in minutes with the power of AI.
- f. **Fiverr** - Fiverr connects businesses with freelancers offering digital services in 500+ categories.
- g. **Clickfunnels** - ClickFunnels allows using its analytics tool to keep track of your funnel's performance that includes conversions, click-throughs, visitors, and opt-ins.
- d. **Kajabi** - Kajabi empowers you to create all kinds of content to showcase what you know best, including online courses, coaching programs, podcasts, memberships, and more.

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## **Instagram Education:**

**You Asked:** *Are there leading experts who can teach me how to understand and effectively use Instagram for business purposes?*

There are many out there but what are your biggest challenges with using Instagram? No one size fits all course/expert. You need to find one that fits your brand. Authenticity is key to your social platforms. Be authentic and post.

**Follow:** <https://www.instagram.com/creators/>

## **Creating a Marketing Plan**

**You Asked:** *What are the essential steps to create a consistent promo/marketing plan?*

### **Must Haves:**

- Create Goals/Objectives/Strategic Plan
  - *What are you marketing?*
  - *What is it that you are trying to offer?*
- Marketing Calendar
- Choose Your Channels
  - *Email, social, website, Youtube*
- Create Key Messages
- Execute and Measure